

Guide to
COUNTER Release 5 Reporting

OSA COUNTER 5 Portal Overview

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1) About COUNTER Release 5

Release 5 of the COUNTER Code of Practice is designed to balance changing reporting needs with the need to make things simpler, so that all content providers can achieve compliance and librarians can have usage statistics that are credible, consistent and comparable. For more information, please refer to the full [Code of Practice](#).

There are several different types of usage metric in Release 5, which breakdown into *investigations* and *requests*.

An investigation is tracked when a user performs any action in relation to a content item or title, while a request is specifically related to viewing or downloading the full content item (see Figure 1).

a. Metrics

Investigations

- ‘Total_Item_Investigations’: the total number of times a content item or information related to a content item was accessed.
- ‘Unique_Item_Investigations’: the number of unique content items (e.g. chapters) investigated by a user.
- ‘Unique_Title_Investigations’: the number of unique titles (e.g. books) investigated by a user.

Requests

- ‘Total_Item_Requests’: the total number of times the full text of a content item was downloaded or viewed.
- ‘Unique_Item_Requests’: the number of unique content items (e.g. chapters) requested by a user.
- ‘Unique_Title_Requests’: the number of unique titles (e.g. books) requested by a user.

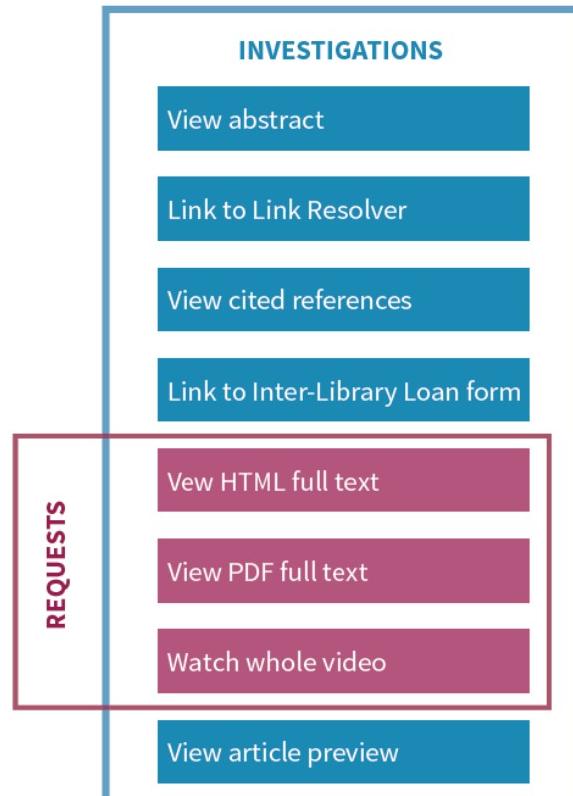


Figure 1: The relationship between “Investigations” and “Requests”

Access Denials

Access denials are sometimes known as turnaways. Two varieties of access denial metric are tracked in Release 5:

- ‘No_License’: counted when a user is unable to access a unique content item because their institution does not have a license to the content.
- ‘Limit_Exceeded’: counted when a user is unable to access a unique content item because their institution’s cap on the number of simultaneous users has been exceeded.

Searches

There are four different types of search metric in Release 5:

- ‘Searches-Regular’: the number of times a user searches a database, when they have actively chosen that database from a list of options OR there is only one database available to search.
- ‘Searches_Automated’: the number of times a user searches a database, when they have *not* actively chosen that database from a list of options. That is, Searches_Automated is recorded when the platform offers a search across multiple databases by default, and the user has not elected to limit their search to a subset of those databases.
- ‘Searches_Platform’: the number of times a user searches a database, regardless of the number of databases involved in the search.
- ‘Searches_Federated’: the number of times a search is run remotely by a computer.

b. Attributes and Parameters

Release 5 of the COUNTER Code of Practice has added a series of elements and attributes to our longer-standing metrics. These help to provide much more granular information in an organized way, as well as letting the COUNTER team maintain and amend the Code of Practice over time.

Briefly, the new elements are:

- ‘Data_Type’: used to group content at the level of the Title.
- ‘Section_Type’: used when Data_Types are delivered in small sub-units (e.g. journal articles).
- ‘Access_Type’: used to determine whether content was Open Access or not.

- ‘Access_Method’: applies when a Host allows Text and Data Mining (TDM) of their content, and is able to distinguish TDM activity from all other activity.
- ‘YOP’: Year of Publication, the four-digit year in which the Version of Record was published.

For full details please see the [Code of Practice](#).

c. COUNTER 5 reports

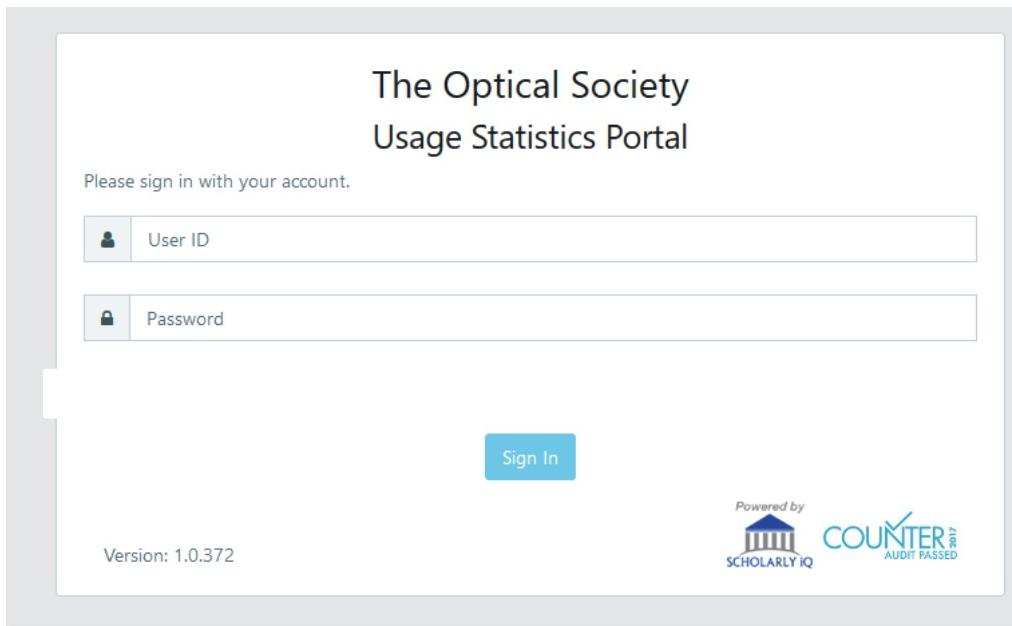
Release 5 of the COUNTER Code of Practice includes four Master Reports covering a very wide spectrum of activities:

- Platform Master Report
- Database Master Report
- Title Master Report
- Item Master Report

For ease of use, each of the Master Reports is associated with one or more summaries of particular types of activity, such as usage or access denials, called Standard Views. You can filter a Master Report to show a Standard View (or a custom view to suit your needs) using standard spreadsheet tools. Standard Views only hold a subset of the information from a Master Report, not the complete data set, so it is not possible to ‘unfilter’ a Standard View to obtain its parent Master Report.

2) Logging in

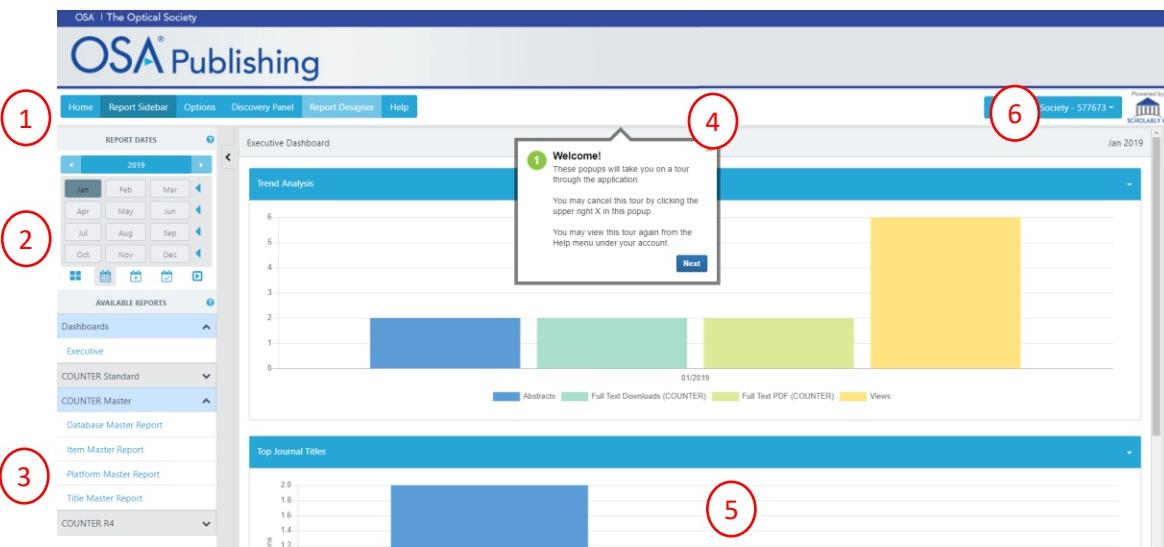
Go to <https://r5.osareports.org/> and enter username and password provided.



3) Navigating within the portal

The OSA COUNTER 5 portal provided by Scholarly iQ (www.scholarlyiq.com) is designed to be as user-friendly and intuitive as possible whilst being compliant to the latest standards.

Once logged in you will be presented the following page with an Executive Dashboard to visualise key usage criteria.

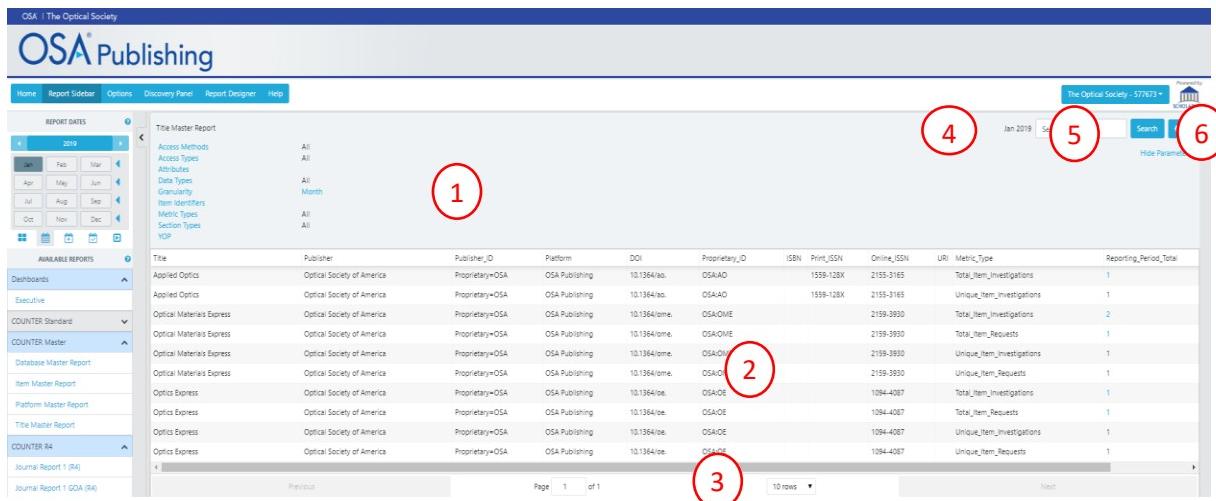


Sample dashboard

The primary features of the reporting interface include:

- 1) Report Toolbar - the toolbar contains buttons allowing you to expand/collapse sidebars, change options, link to help and perform actions on your account such as SUSHI registration.
 - a. Home – click the Home button to return to the main page of the application
 - b. Report Sidebar – click the Report Sidebar to expand or collapse the left sidebar
 - c. Options – click the Options button to customise your preferences such as Rows Per Page and Chart Engine
 - d. Discovery Panel - click the Discovery Panel button to expand or collapse the right sidebar. The Discovery Panel allows you to add and remove filters, attributes, and metrics when a report is displayed
 - e. Report Designer - click the Report Designer button to change report parameters when a report is displayed
 - f. Help – click the Help button to link to support and help materials
- 2) Calendar – the calendar control allows you to apply date ranges to the active dashboard or report
- 3) Available Reports – this area lists the reports that are enabled for your account. Reports are grouped by category and clicking a report will display it with the active date range
- 4) Help Widget – the Help Widget can be selected from Help in the Report Toolbar or under Account Name to guide you through reporting steps and using the portal
- 5) Dashboard and Report Screen – displays the requested reports, data tables and charts
- 6) Customer Name – displays Customer Name and includes dropdown to links for Select Account, Help, SUSHI, Version and Sign Out

When a report is requested the following additional options are presented to the user:



The screenshot shows the OSA Publishing report interface with several features highlighted:

- 1**: A red circle highlights the "REPORT DATES" section, which includes a calendar for selecting months and a dropdown menu for "Title Master Report" with various filter options.
- 2**: A red circle highlights the main data table displaying report results. The columns include Title, Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, ISBN, Print_ISBN, Online_ISBN, URL, Metric_Type, and Reporting_Period_Total.
- 3**: A red circle highlights the bottom navigation bar with "Previous", "Page 1 of 1", "10 rows", and "Next".
- 4**: A red circle highlights the "Help" button in the top right corner of the toolbar.
- 5**: A red circle highlights the "Search" button in the top right corner of the toolbar.
- 6**: A red circle highlights the "Hide Parameters" link in the top right corner of the toolbar.

Sample report

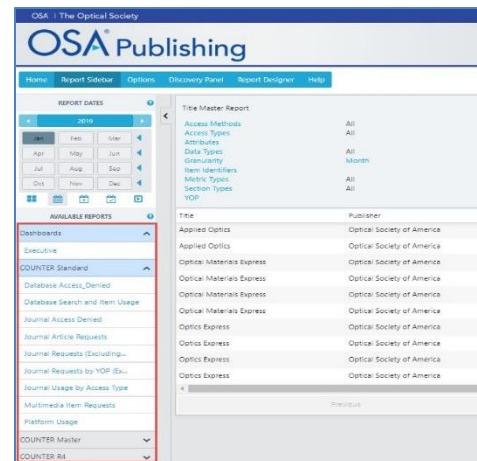
The additional features displayed within a report include

- 1) Report configuration – allows you to select/deselect report attributes and metrics (R5 only)
- 2) Report details – displays requested report table
- 3) Report navigation – allows you to navigate through report table and change number of rows displayed
- 4) Date – displays date range of active report
- 5) Search – allows you to search for specific line items such as ‘American National Biography’
- 6) Export – allows you to export data in report to CSV

4) Report selection

OSA customer usage reports are available in Dashboards, COUNTER Master, COUNTER Standard, COUNTER R4 and OSA Reports in the left hand sidebar.

- Dashboards contain single page overviews of report data
- COUNTER Master reports can be dynamically filtered and changed
- COUNTER Standard reports are pre-configured and cannot be dynamically changed

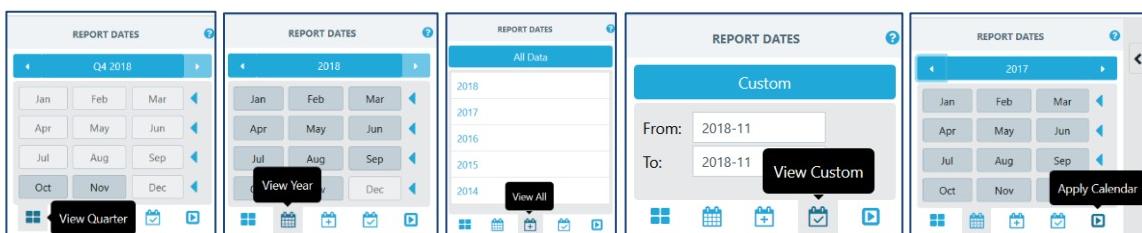


Title	Publisher
Applied Optics	Optical Society of America
Applied Optics	Optical Society of America
Optical Materials Express	Optical Society of America
Optical Materials Express	Optical Society of America
Optical Materials Express	Optical Society of America
Optics Express	Optical Society of America
Optics Express	Optical Society of America
Optics Express	Optical Society of America
Optics Express	Optical Society of America

Clicking on a report will display it with the active date range.

5) Calendar selection

Selection of date ranges from the Calendar control will apply the requested date range to the active dashboard or report.



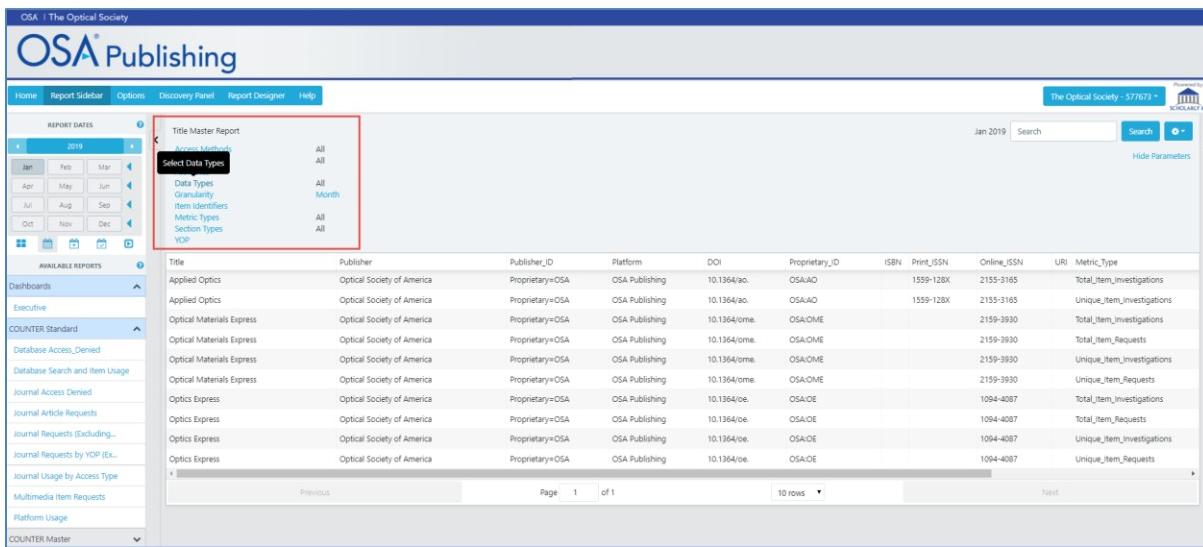
6) Running a COUNTER 5 Master Report

COUNTER Master reports selected from Available Reports are designed to be able to show all available COUNTER metrics and attributes, and for these to be dynamically filtered and changed.

COUNTER 5 Master Reports can be customized by available attributes and metrics in 3 ways:

a. Report Configuration

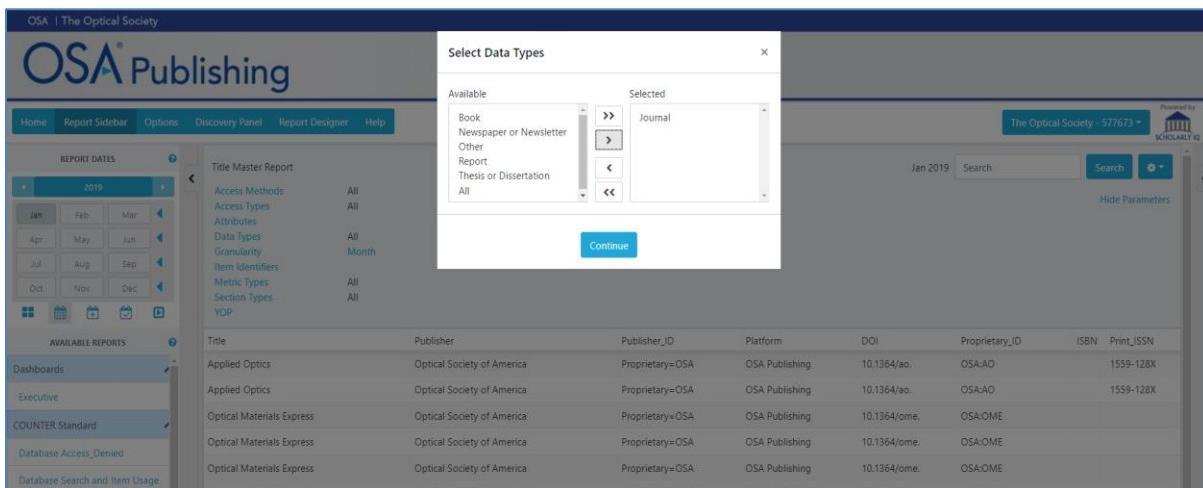
The current report configuration is visible at the top of Master Reports. Clicking on an attribute allows you to edit or change which attributes and metrics are displayed in the report.



The screenshot shows the OSA Publishing interface with the 'Title Master Report' selected. In the 'Select Data Types' dialog, 'Journal' is listed under 'Selected'. The main table displays various titles and their metadata.

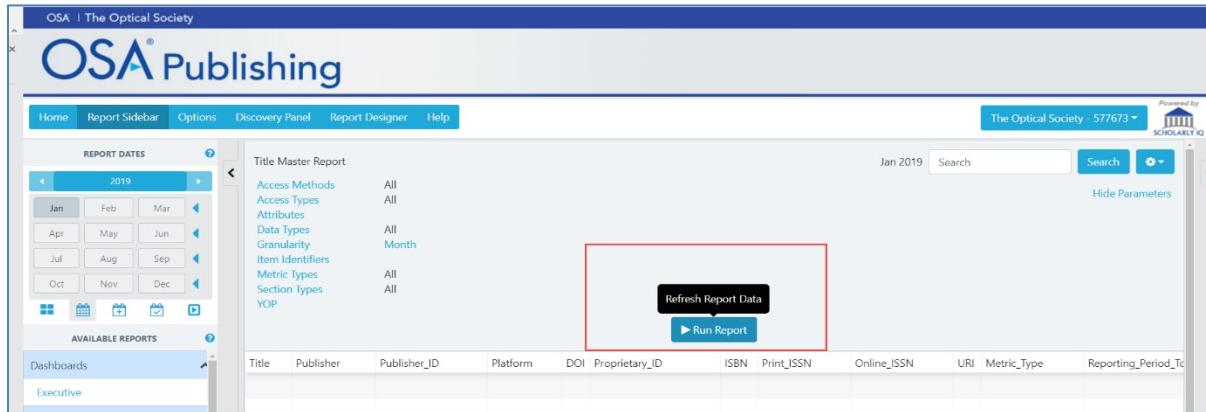
Title	Publisher	Publisher_ID	Platform	DOI	Proprietary_ID	ISBN	Print_ISSN	Online_ISSN	URI	Metric_Type
Applied Optics	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ao.	OSA:AO	1559-128X	2155-3165			Total_Item_Investigations
Applied Optics	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ao.	OSA:AO	1559-128X	2155-3165			Unique_Item_Investigations
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSA:OME		2159-3930			Total_Item_Investigations
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSA:OME		2159-3930			Total_Item_Requests
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSA:OME		2159-3930			Unique_Item_Investigations
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSA:OME		2159-3930			Unique_Item_Requests
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSA:OE		1094-4087			Total_Item_Investigations
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSA:OE		1094-4087			Total_Item_Requests
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSA:OE		1094-4087			Unique_Item_Investigations
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSA:OE		1094-4087			Unique_Item_Requests

Selecting available attributes or metrics allows you to add or remove which attributes or metrics are included in your next report.



The screenshot shows the 'Select Data Types' dialog with 'Journal' selected. The 'Available' list includes Book, Newspaper or Newsletter, Other, Report, Thesis or Dissertation, and All. The 'Selected' list contains Journal. A 'Continue' button is visible at the bottom of the dialog.

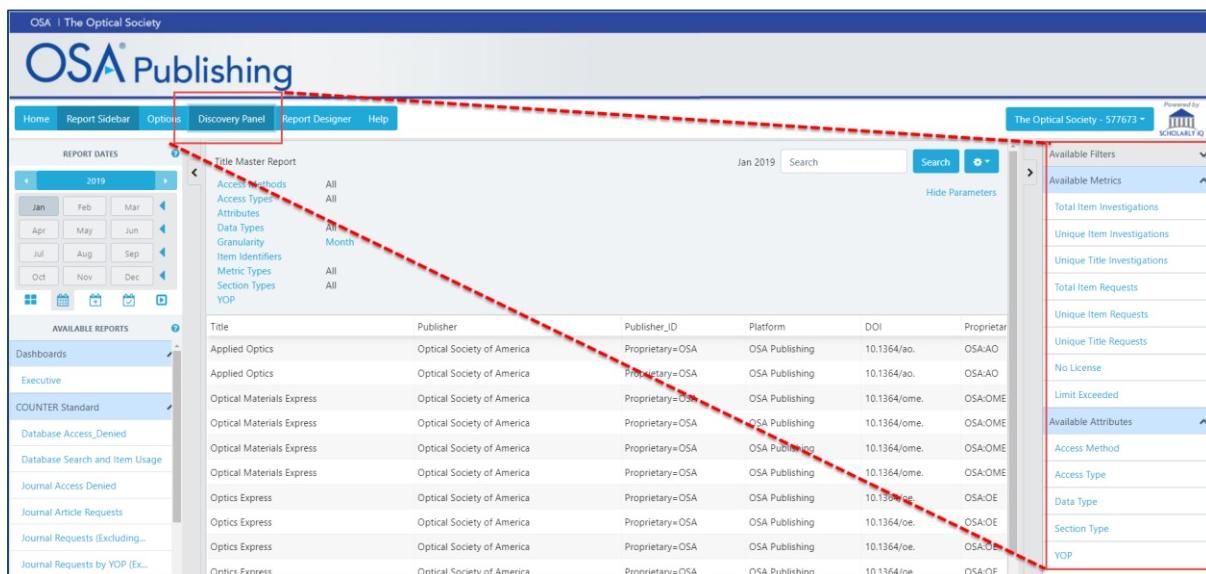
When all the required attributes and metrics are selected you can generate the report.



The screenshot shows the OSA Publishing interface with the Report Designer tab selected. On the left, there's a sidebar with 'REPORT DATES' set to Jan 2019 and 'AVAILABLE REPORTS' including Dashboards and Executive. The main area shows a 'Title Master Report' configuration with various filters like Access Methods, Data Types, and Metric Types. At the bottom right of this panel is a 'Run Report' button, which is highlighted with a red box. Above the report panel, there's a search bar and a 'Hide Parameters' link. The top right corner shows 'The Optical Society - 577673' and the Scholarly iQ logo.

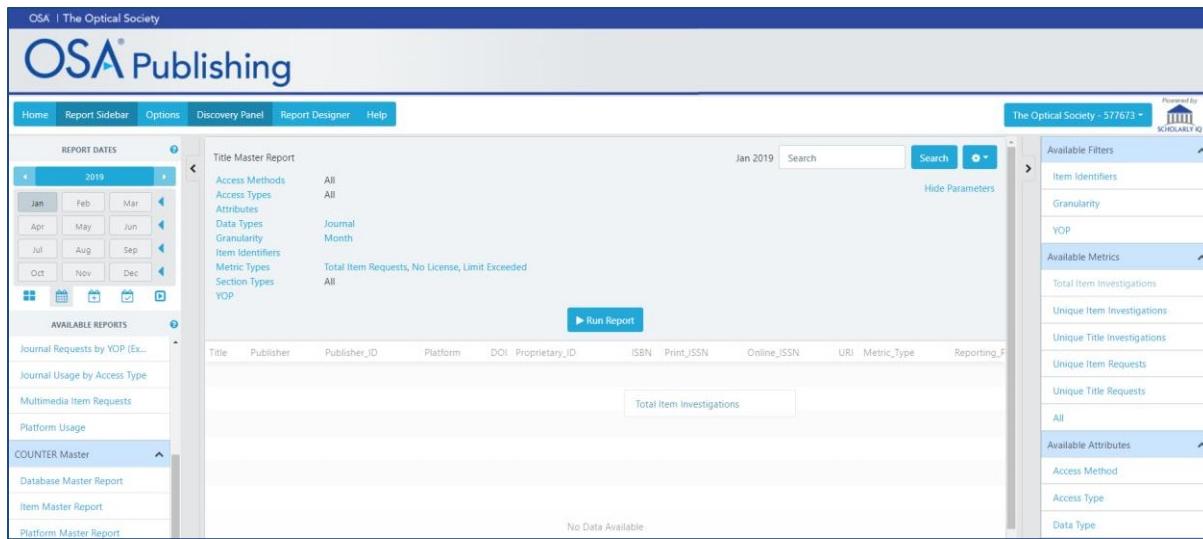
b. Discovery Panel

Clicking the Discovery Panel button in the top toolbar expands or collapses the right sidebar. The Discovery Panel allows you to add and remove filters, attributes, and metrics when a report is displayed



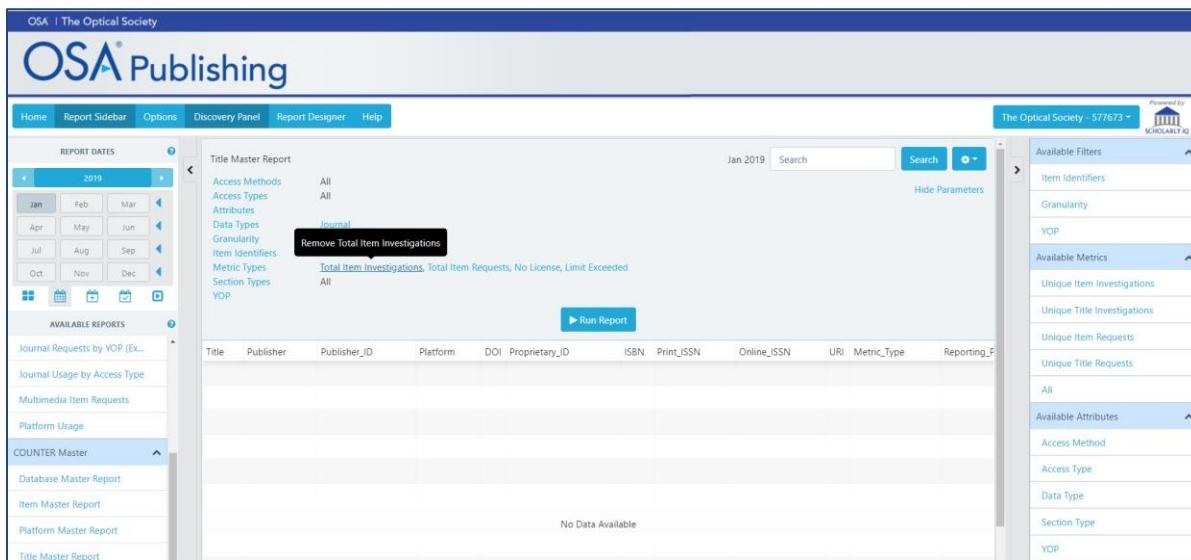
This screenshot shows the same OSA Publishing interface as above, but with the 'Discovery Panel' button in the top toolbar highlighted by a red box. This has caused the right sidebar to expand, revealing several sections: 'Available Filters', 'Available Metrics', and 'Available Attributes'. The 'Available Metrics' section lists items like Total Item Investigations, Unique Item Investigations, Unique Title Investigations, etc. The 'Available Attributes' section lists Access Method, Access Type, Data Type, Section Type, and YOP. A red dashed line connects the 'Discovery Panel' button to the start of the expanded sidebar.

Selecting or drag and dropping attributes and metrics will add them to the selected Master report.



The screenshot shows the 'Title Master Report' configuration. The 'Available Metrics' sidebar is open, and 'Total Item Investigations' is selected. Other metrics listed include Unique Item Investigations, Unique Title Investigations, Unique Item Requests, Unique Title Requests, Available Attributes, Access Method, Access Type, and Data Type.

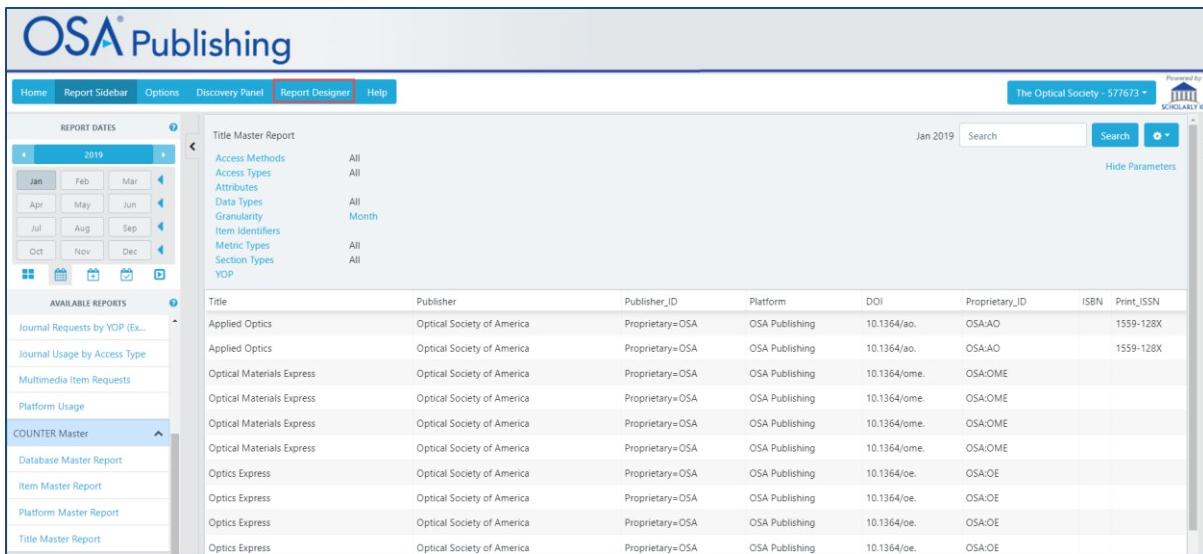
Clicking on a selected attribute or metric within the report configuration will remove the selected attribute or metric from the report.



The screenshot shows the 'Title Master Report' configuration after the 'Total Item Investigations' metric has been removed. The 'Available Metrics' sidebar is open, and the 'Total Item Investigations' option is no longer present, indicating it has been deselected.

c. Report Designer

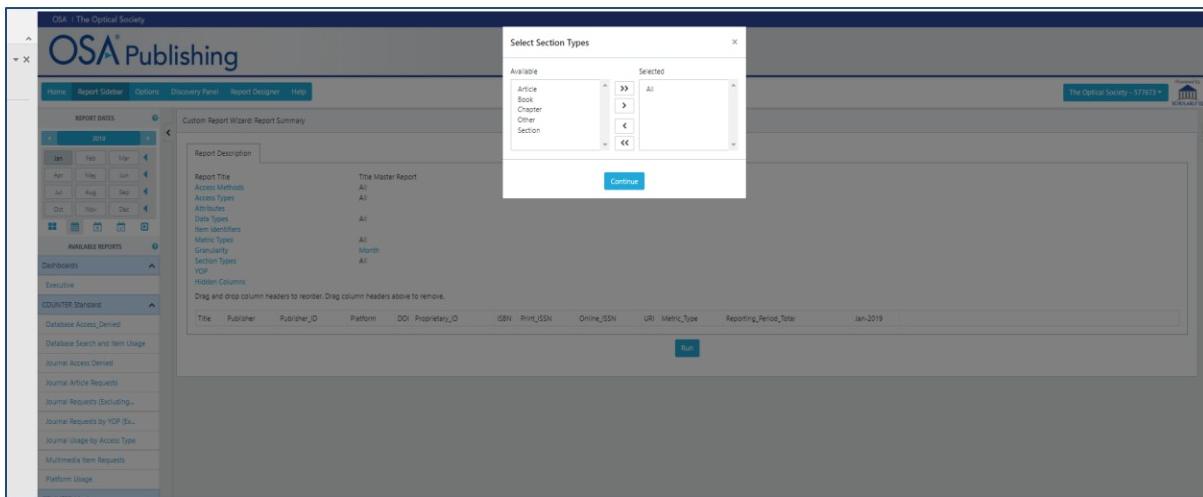
The report designer also allows you to change report parameters when a report is displayed by opening a Report Description.



The screenshot shows the 'Report Designer' tab selected in the top navigation bar. On the left, there's a sidebar titled 'AVAILABLE REPORTS' listing various report types like 'Journal Requests by YOP' and 'Title Master Report'. The main area displays a table titled 'Title Master Report' with columns for Title, Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, ISBN, and Print_ISSN. The table lists several journals from the Optical Society of America.

Title	Publisher	Publisher_ID	Platform	DOI	Proprietary_ID	ISBN	Print_ISSN
Applied Optics	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ao.	OSA:AO		1559-128X
Applied Optics	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ao.	OSAAO		1559-128X
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSA:OME		
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSA:OME		
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSA:OME		
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSA:OE		
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSA:OE		
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSA:OE		
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSA:OE		

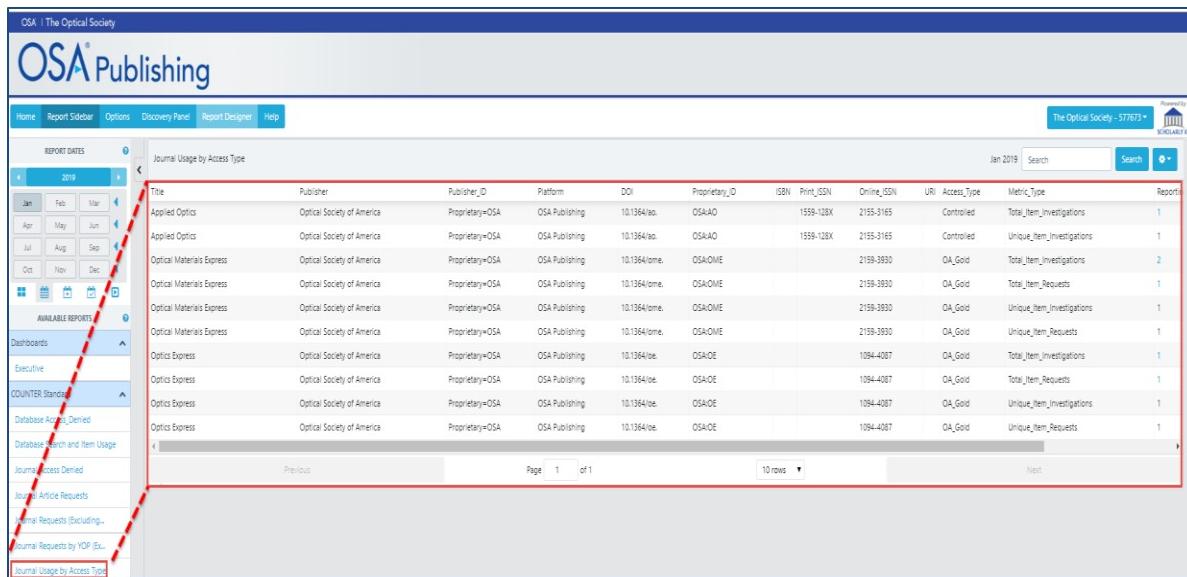
The Report Description can be edited by selecting required attributes or parameters from within the report designer.



This screenshot shows the 'Report Designer' interface with the 'Custom Report Wizard: Report Summary' step active. A 'Select Section Types' dialog box is open, showing a list of available section types (Article, Book, Chapter, Other, Section) on the left and a 'Selected' list on the right. The 'Continu...' button is visible at the bottom of the dialog. Below the dialog, the report summary configuration is shown, including report title, access methods, and other parameters.

7) Running a COUNTER 5 Standard report

Selecting a COUNTER 5 Standard report from the COUNTER Standard report folder will generate a pre-configured COUNTER compliant version of that standard report. COUNTER 5 Standard reports are fixed and cannot be changed.

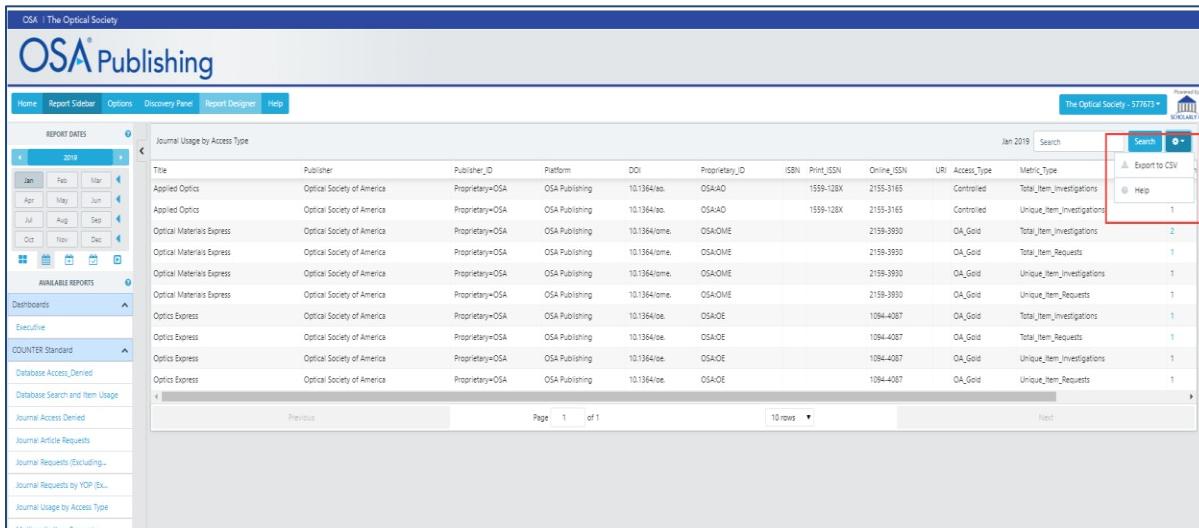


The screenshot shows the 'Journal Usage by Access Type' report. The data grid contains the following information:

Title	Publisher	Publisher_ID	Platform	DOI	Proprietary_ID	ISBN	Print_ISSN	Online_ISSN	URI	Access_Type	Metric_Type	Report
Applied Optics	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ao.	OSAAO	1559-128X	2155-3165			Controlled	Total_Item_Investigations	1
Applied Optics	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ao.	OSAAO	1559-128X	2155-3165			Controlled	Unique_Item_Investigations	1
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSAOOME			2159-3930		OA_Gold	Total_Item_Investigations	2
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSAOOME			2159-3930		OA_Gold	Total_Item_Requests	1
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSAOOME			2159-3930		OA_Gold	Unique_Item_Investigations	1
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSAOOME			2159-3930		OA_Gold	Unique_Item_Requests	1
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSAOE			1094-4087		OA_Gold	Total_Item_Investigations	1
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSAOE			1094-4087		OA_Gold	Total_Item_Requests	1
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSAOE			1094-4087		OA_Gold	Unique_Item_Investigations	1
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSAOE			1094-4087		OA_Gold	Unique_Item_Requests	1

8) Exporting and saving data

Data from any report can be exported to CSV and saved locally.



The screenshot shows the 'Journal Usage by Access Type' report. The 'Export to CSV' button is highlighted with a red box. The data grid contains the same information as the previous screenshot.

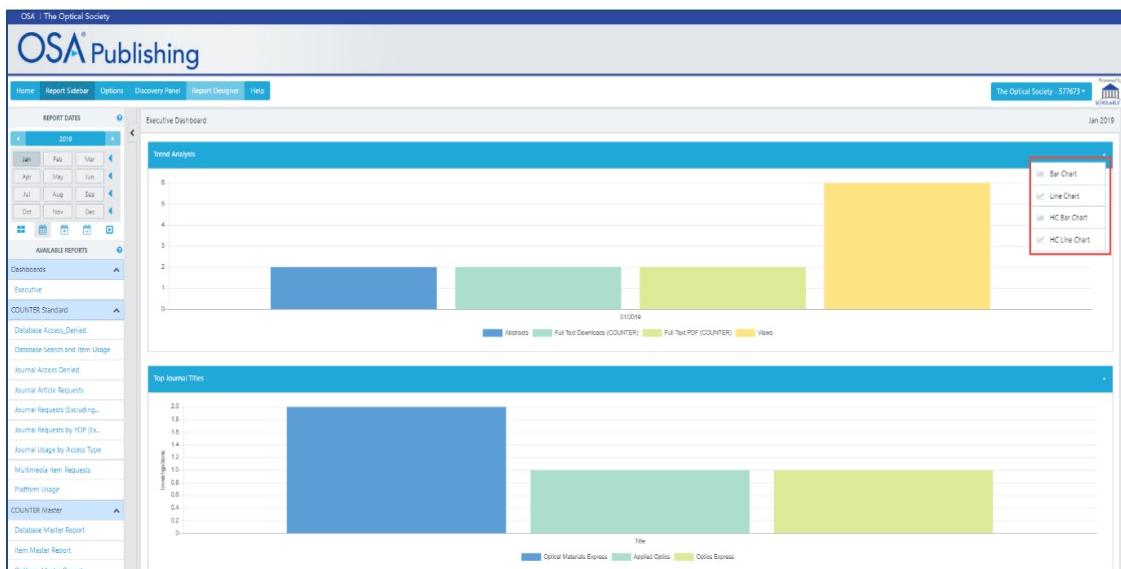
The report will be downloaded in COUNTER compliant format.

Title Master Report																	
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1 Report_N	Title Master Report																
2 Report_ID	TR																
3 Release	5																
4 Institution	Client Demo Site																
5 Institution	DEMO:327139																
6 Metric_Ty	Total_Item_Investigations;Total_Item_Requests;Unique_Item_Investigations;Unique_Item_Requests;Unique_Title_Requests;Unique_Title_Investigations;Limit_Exceeded;No_License																
7 Report_Fil	Data_Type=Book Journal Newspaper or Newsletter Other Report Thesis or Dissertation																
8 Report_Attributes																	
9 Exceptions																	
10 Reporting_Begin_Date	=2016-03-01; End_Date=2016-03-31																
11 Created	2019-01-23T10:43:15Z																
12 Created_B	Scholarly iQ																
13																	
14 Title	Publisher	Publisher_Platform	DOI	Proprietor_ISBN	Print_ISSN	Online_ISS	URI	Metric_Ty	Reporting	Mar-16							
15 Book	1715	Publisher 109	Platform 1	DEMO:171XXXX-1715				Total_Itm	1	1							
16 Book	1715	Publisher 109	Platform 1	DEMO:171XXXX-1715				Total_Itm	1	1							
17 Book	1715	Publisher 109	Platform 1	DEMO:171XXXX-1715				Unique_Itm	1	1							
18 Book	1715	Publisher 109	Platform 1	DEMO:171XXXX-1715				Unique_Itm	1	1							
19 Book	1715	Publisher 109	Platform 1	DEMO:171XXXX-1715				Unique_Itm	1	1							
20 Book	1715	Publisher 109	Platform 1	DEMO:171XXXX-1715				Unique_Itm	1	1							
21 Journal	10	Publisher 111	Platform 1	DEMO:10	XXXX-10	XXXX-10		Total_Itm	20	20							
22 Journal	10	Publisher 111	Platform 1	DEMO:10	XXXX-10	XXXX-10		Total_Itm	10	10							
23 Journal	10	Publisher 111	Platform 1	DEMO:10	XXXX-10	XXXX-10		Unique_Itm	13	13							
24 Journal	10	Publisher 111	Platform 1	DEMO:10	XXXX-10	XXXX-10		Unique_Itm	9	9							
25 Journal	11	Publisher 111	Platform 1	DEMO:11	XXXX-11	XXXX-11		Total_Itm	6	6							
26 Journal	11	Publisher 111	Platform 1	DEMO:11	XXXX-11	XXXX-11		Total_Itm	6	6							
27 Journal	11	Publisher 111	Platform 1	DEMO:11	XXXX-11	XXXX-11		Unique_Itm	6	6							

9) Additional features

The OSA COUNTER Release 5 portal includes a number of additional user-friendly features to aid report customisation.

- Change chart type in dashboard



- Change report rankings – click on column header (second click switches between ascending and descending)

OSA | The Optical Society

OSA Publishing

Home Report Sidebar Options Discovery Panel Report Designer Help

REPORT DATES 2019 Jan Feb Mar Jun Jul Aug Sep Oct Nov Dec View Custom

AVAILABLE REPORTS Dashboards Executive COUNTER Standard Database Access Denied Database Search and Item Usage Journal Access Denied Journal Article Requests Journal Requests (Excluding...) Journal Requests by YOP (Ex...) Journal Usage by Access Type Multimedia Item Requests

Title Master Report

Access Methods All
Access Types All
Attributes All
Data Types All
Granularity Month
Item Identifiers All
Metric Types All
Section Types YOP

Title	Publisher	Publisher_ID	Platform	DOI	Proprietary_ID	ISBN	Print_ISSN	Online_ISSN	URI	Metric_Type	Reporting_Period_Total
Applied Optics	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/ao.	OSAAO	1559-128X	2155-3165			Total_Item_Investigations	1
Applied Optics	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/ao.	OSAAO	1559-128X	2155-3165			Unique_Item_Investigations	1
Optical Materials Express	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/ome.	OSAOOME		2159-3930			Total_Item_Investigations	2
Optical Materials Express	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/ome.	OSAOOME		2159-3930			Total_Item_Requests	1
Optical Materials Express	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/ome.	OSAOOME		2159-3930			Unique_Item_Investigations	1
Optical Materials Express	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/ome.	OSAOOME		2159-3930			Unique_Item_Requests	1
Optics Express	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/oe.	OSAOE	1094-4087				Total_Item_Investigations	1
Optics Express	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/oe.	OSAOE	1094-4087				Total_Item_Requests	1
Optics Express	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/oe.	OSAOE	1094-4087				Unique_Item_Investigations	1
Optics Express	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/oe.	OSAOE	1094-4087				Unique_Item_Requests	1

Page 1 of 1 10 rows Next

- Drag and drop columns to change report layout

OSA | The Optical Society

OSA Publishing

Home Report Sidebar Options Discovery Panel Report Designer Help

REPORT DATES 2019 Jan Feb Mar Jun Jul Aug Sep Oct Nov Dec View Custom

AVAILABLE REPORTS Dashboards Executive COUNTER Standard Database Access Denied Database Search and Item Usage Journal Access Denied Journal Article Requests Journal Requests (Excluding...) Journal Requests by YOP (Ex...) Journal Usage by Access Type Multimedia Item Requests

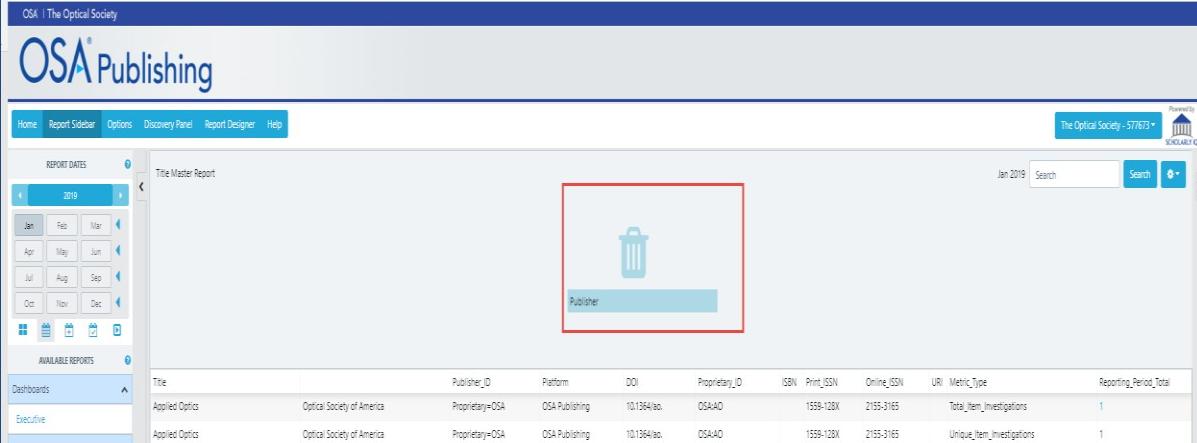
Title Master Report

Access Methods All
Access Types All
Attributes All
Data Types All
Granularity Month
Item Identifiers All
Metric Types All
Section Types YOP

Title	Publisher	Publisher_ID	Platform	DOI	Proprietary_ID	ISBN	Print_ISSN	Online_ISSN	URI	Metric_Type	Reporting_Period_Total
Applied Optics	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/ao.	OSAAO	1559-128X	2155-3165			Total_Item_In	1
Applied Optics	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/ao.	OSAAO	1559-128X	2155-3165			Unique_Item_In	1
Optical Materials Express	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/ome.	OSAOOME		2159-3930			Total_Item_In	2
Optical Materials Express	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/ome.	OSAOOME		2159-3930			Total_Item_Requests	1
Optical Materials Express	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/ome.	OSAOOME		2159-3930			Unique_Item_Investigations	1
Optical Materials Express	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/ome.	OSAOOME		2159-3930			Unique_Item_Requests	1
Optics Express	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/oe.	OSAOE	1094-4087				Total_Item_In	1
Optics Express	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/oe.	OSAOE	1094-4087				Total_Item_Requests	1
Optics Express	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/oe.	OSAOE	1094-4087				Unique_Item_Investigations	1
Optics Express	Optical Society of America	Proprietary+OSA	OSA Publishing	10.1364/oe.	OSAOE	1094-4087				Unique_Item_Requests	1

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- Drag a column header up to remove the column from the report



Reporting_Period_Total	Metric_Type	URI	Online_ISSN	Print_ISSN	DOI	Platform	Publisher_ID	Title	Available Reports
1	Total_Item_Investigations	2155-3165	1558-128X	10.1364/os	OSA Publishing	Proprietary+OSA	Optical Society of America	Applied Optics	Executive
1	Unique_Item_Investigations	2155-3165	1558-128X	10.1364/os	OSA Publishing	Proprietary+OSA	Optical Society of America	Applied Optics	Dashboards

10) Help

a. In portal help

Help materials, including the Help Widget are available within the reporting portal. Help is available from the Help button in the top toolbar or from the dropdown when you click on your account name.

b. OSA Customer Services

For most direct support issues please contact OSA Customer Services as follows:

Email: elec@osa.org

c. Scholarly iQ

For technical portal and SUSHI support issues please contact support@scholarlyiq.com.

11) SUSHI

R5 SUSHI Setup

The Standardized Usage Statistics Harvesting Initiative (SUSHI) protocol is an automated request and response model for harvesting usage data.

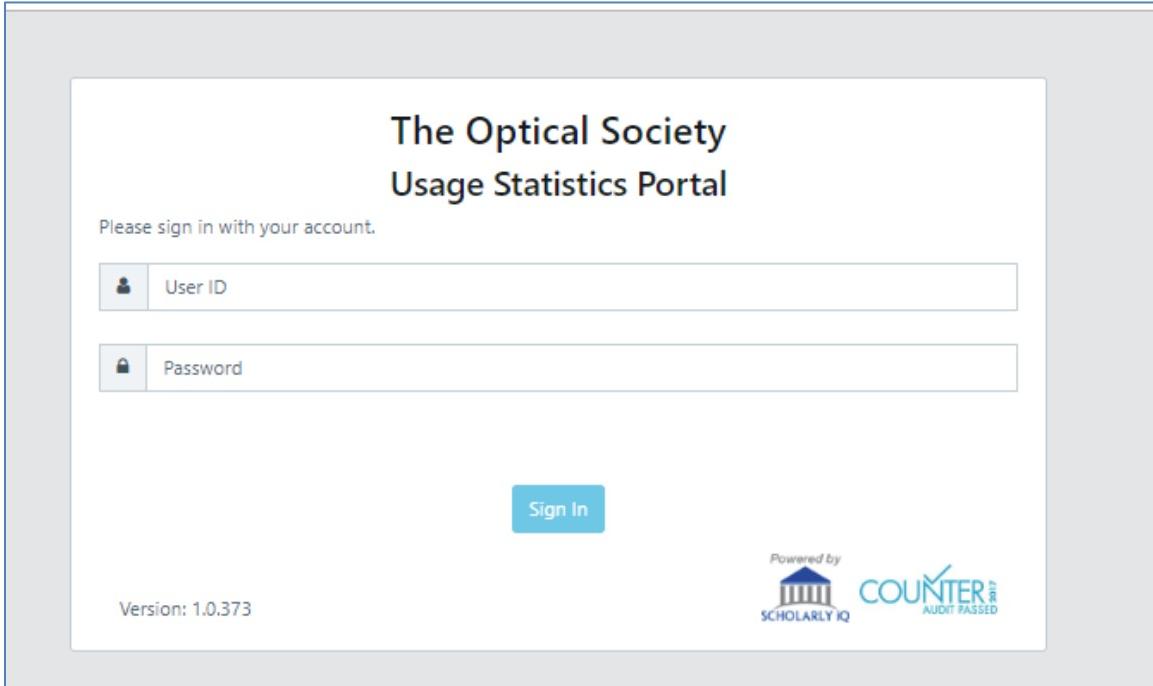
Users who have used SUSHI reports for COUNTER 4 reports will need to request new SUSHI credentials to access COUNTER 5 SUSHI reports. To access your COUNTER 5 compliant reports from OSA, simply follow the 5 easy steps to retrieve your SUSHI access credentials today. With these, you can begin harvesting usage reports using your preferred SUSHI ERM tool.

The OSA SUSHI web service is available 24 hours per day, 7 days a week. If you need assistance beyond the self-service SUSHI activation process, please contact the OSA Help Desk for further assistance.

Step 1

Go to the OSA Librarian Resource Center at <https://www.osapublishing.org/library/#> and click on the COUNTER Reports Log In.

Or navigate to the reports directly at <https://r5.osareports.org/>



The screenshot shows the sign-in page for "The Optical Society Usage Statistics Portal". The page has a light gray background with a white central form area. At the top center, the text "The Optical Society Usage Statistics Portal" is displayed in a dark brown, serif font. Below this, a message "Please sign in with your account." is shown in a smaller, gray font. The form consists of two input fields: "User ID" with a user icon and "Password" with a lock icon. Below the password field is a "Sign In" button with a rounded blue border and white text. At the bottom left, the text "Version: 1.0.373" is visible. At the bottom right, there are two logos: "Powered by SCHOLARLY iQ" and "COUNTER AUDIT PASSED".

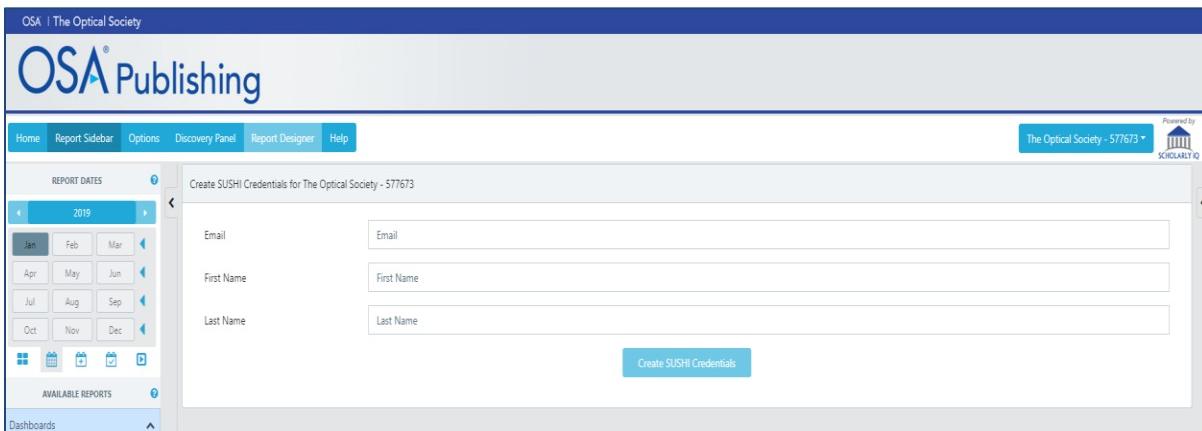
Step 2

Click down your account name and select SUSHI. This will navigate to the SUSHI registration page.



Step 3

Enter your Email, First Name, and Last name. Click Create SUSHI Credentials.



Step 4

You will then be presented with your SUSHI credentials. They will also be emailed to you. You may also download a list of the authorized COUNTER reports supported by OSA.

The required SUSHI account credentials for your institution will include:

Requestor ID:
Institution ID/Customer ID:

Step 5

To then access the OSA SUSHI web service, simply point your own SUSHI client or access software to the following service URL: <https://sushi5.scholarlyiq.com/counter/r5>.

Your SUSHI Client application's "ReportRequest" will require the supplied Requestor ID, Institution ID (Customer Reference) as well as The Report Type, the Report Version (3) and the Usage ranges you want to harvest.

If you have any questions about our service or need some assistance, please contact our support desk at elec@osa.org.

Please refer to COUNTER for further information on harvesting.

<https://www.projectcounter.org/code-of-practice-five-sections/8-sushi-automated-report-harvesting/>